

Excerpts from “Developing a Workforce Plan: Setting the Foundation” Training Presentation Relevant to Step 3

Slide 1– Secure Executive Support

Barriers to support

Cost context: Value of Workforce Planning in terms of budget and productivity

Statewide issue

Plan to use existing resources

Slide 2 – Maintain Executive Support

Maintain involvement and communication

Present salient facts from gap analysis to leadership

Show need for developing specific strategies

Explain specific resources needed and how they will solve the problems

No end surprises

Slide 3- The 3 Risk Areas of Workforce Planning

Recruitment

Retention

Succession Planning

Develop strategies that mitigate risks based on gap analysis findings

Slide 4 – Gap Analysis Methodology

Bring together your data from supply and competency gaps to define the overall workforce gap for each classification

Slide 5 – Targeting Strategies

Align with strategic missions/goals

Utilize data to expose opportunities

Prioritize by key classifications and competencies

Slide 6 – Recruitment Strategies

Utilize Data: high competency gaps, high vacancy rates

Tailor recruitment strategies

Hiring processes

Exams

Application screening

Behavioral interviewing

Slide 7- Contact the Statewide Recruiter

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Slide 8 – Retention Strategies

Utilize data: high turnover, high transfer patterns

Employee satisfaction survey

Input from division/program management

Retention Strategy Survey (when available)

Slide 9 - Examples of Retention Strategies

Employee recognition program

Knowledge transfer opportunities

New Employee Onboarding

Slide 10 – New Employee Orientation V. Onboarding

Orientation and onboarding are different processes

Onboarding represents a form of institutional knowledge transfer while orientation is simply transfers explicit knowledge

Slide 11 – New Employee Orientation

Focus on transactional processes (for example: computer set-up, acquiring name badge)

Less than 1 week

Executed by designated division/program

Addresses benefits and provides departmental overview

Employee participation is passive

Establishes new hires into department

Slide 12 – Onboarding

Assimilation process focused on tools and knowledge to be successful

Includes 1st year

Integrates multiple functions/individuals

Addresses all new employee needs over long-term

Employee participation is active

Aims to increase retention and productivity

Slide 13 – Onboarding at the Department of Technology

Download the [New Employee Onboarding Plan](#) from the Department of Technology

Slide 14 – Succession Planning

Purpose: Mitigate separation risks

Process: Recognize, develop, and retain leadership talent especially in critical classifications

Product: Practical strategies to develop a pipeline of future leaders

Slide 15 – Succession Planning Strategies

Voluntary nomination to leadership development program

Knowledge transfer opportunities

Slide 16 – Knowledge Transfer Goals

Mitigate retention and separation risks

Develop current workforce

Ensure important knowledge is not lost

Slide 17 – Types of Knowledge

Explicit = concrete, for example: Procedural knowledge

Tacit = experiential, for example: Personal characteristics and Development of cooperative partnerships

Both Explicit and Tacit are combined in Institutional knowledge

Slide 18 – Examples of Explicit Knowledge Transfer Strategies

Individual professional development

Desk manuals

Online options

Orientation

Slide 19 – Examples of Tacit Knowledge Transfer Strategies

Coaching

Career development

Slide 20 - Examples of Institutional Knowledge Transfer Strategies

Group activities

Cross-training

Mentorship

Job shadowing

Onboarding

Slide 21 – Knowledge Transfer at Caltrans

Download the [Knowledge Transfer Guidebook](#) from Caltrans

Slide 22 – Benefits of Mentorship

Builds bench strength

Provides global perspective

Strengthens diversity

Engages staff in departments mission

Supports succession planning

Fosters trust, respect and openness

Slide 23 – Mentorship Best Practices

Voluntary participation

Identify development goals

Respect confidentiality in sessions

Respect each other's time

Slide 24 – Informal Mentoring at CalPERS

Download the Informal Mentoring Toolkit for [Managers and Supervisors](#) from CalPERS

Download the Informal Mentoring Toolkit for [Executives and Senior Leaders](#) from CalPERS

Slide 25 – Workforce Plan Template

Download the [Workforce Plan Template](#)

Slide 26 – Establish Metrics

Specific

Measureable

Achievable

Realistic

Time-Bound

Slide 25 – Communicate the Plan

Plan to communicate to stakeholders about progress in a relevant and timely manner

Who needs to know what? How often? In what way?

Refer to Workforce Plan Template Appendix D (page 10)

Keep department engaged

Share workforce and succession planning articles

Advertise professional development opportunities